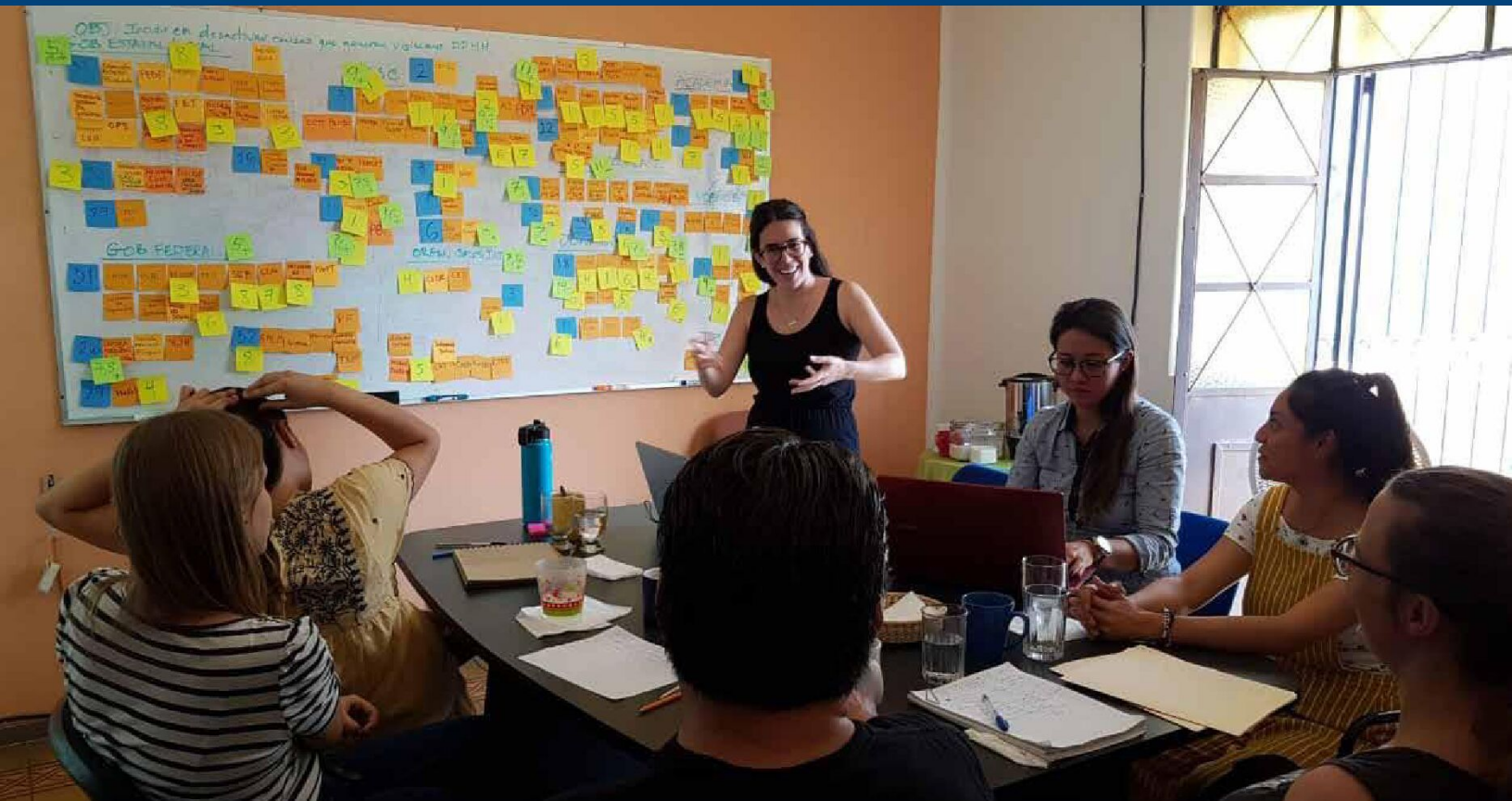




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CIVIL SOCIETY ACTIVITY'S SYSTEMIC APPROACH TO CAPACITY DEVELOPMENT

A Technical Document on the Strengthening of Civil Society in Mexico

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ABOUT USAID MEXICO CIVIL SOCIETY ACTIVITY

Mexico Civil Society Activity (CSA) was a 4-year program funded by the U.S. Agency for International Development (USAID). CSA aimed to improve the sustainability of Civil Society Organizations (CSOs) to effectively implement their agendas on violence prevention, human rights protection and justice reform in Mexico. To this end, CSA focused on improving CSOs' capacity to communicate and work collaboratively, increasing their connections with key stakeholders, strengthening their capacity to develop strategies that respond to their changing environment and to their communities' needs and priorities, and improving CSOs access to knowledge and resources.

The USAID Mexico Civil Society Activity was implemented by Social Impact (SI) Inc. in partnership with Fundación Appleseed.

ABOUT SOCIAL IMPACT

Social Impact (SI) is a management consulting firm that provides monitoring, evaluation, strategic planning, performance management and capacity development services to advance development effectiveness. SI's work helps to reduce poverty, improve health and education, promote peace and democratic governance, foster economic growth, and protect the environment. To achieve this, SI delivers consulting, technical assistance, and training services to government agencies, nongovernmental organizations, and foundations.

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ACRONYMS AND ABBREVIATIONS

5 R'S	A methodology for mapping alliances (Roles, Results, Rules, Resources, Relationships)
AMELP	Activity Monitoring, Evaluation and Learning Plan
APS	Annual Program Statement
CD 2.0	Capacity 2.0
CLA	Collaborating, Learning, and Adapting.
CSA	Civil Society Activity
CSO	Civil Society Organization
HICD	Human and Institutional Capacity Development
ISO	Intermediate Support Organization
J2SR	Journey to Self-Reliance
NUPAS	Non-U.S. Organization Pre-Award Survey
OCA	Organizational Capacity Assessment
OPI	Organizational Performance Index
SI	Social Impact
SNA	Social Network Analysis
USAID	United States Agency for International Development

SUMMARY

This document describes the capacity development work that Social Impact (SI) implemented in Mexico under the Civil Society Activity (CSA) contract funded by USAID/Mexico. CSA's capacity development process focused on three mutually supporting approaches: (1) strengthening internal capacities and organizational processes, (2) strengthening organizational capacities to develop and sustain strategic alliances with actors across sectors, and (3) strengthening the organization's position within the system in which it operates, while also seeking to make that system more hospitable and supportive toward CSOs that work in areas of violence and crime prevention, reform of the justice system, and human rights protection in Mexico.

The Activity's approach included a variety of strategies to strengthen the civil society sector in a systemic fashion. Learning Communities provided generative spaces for organizations to exchange lessons learned and best practices and were designed to be sustainable beyond the life of CSA. The Activity also coordinated a Study Tour for leaders in the civil society sector, government, and the university to learn from the strategies for violence prevention in Colombia. Finally, the Activity partnered with influencers that strengthen the civil society sector as a whole in their given areas of expertise, which will sustain CSA's legacy over time. Each of these activities are described in further detail throughout the document.

CSA's process of capacity development was rooted in self-reliance beginning with the assessment process. The activity developed a single, flexible tool for assessing organizational performance with user-friendly functionality, the Integrated Assessment Tool. CSA uses this integrated tool to assess internal capacities and organizational processes, organizational performance, organizations' collaboration and interaction with other actors in their local system, and organizations' positions within the systems in which they operate. This tool and SI's capacity development approach in CSA contribute to innovation at USAID and the broader international development community by designing an integrated approach to capacity development and systemic change to advance the Journey to Self-Reliance in the Latin American context.

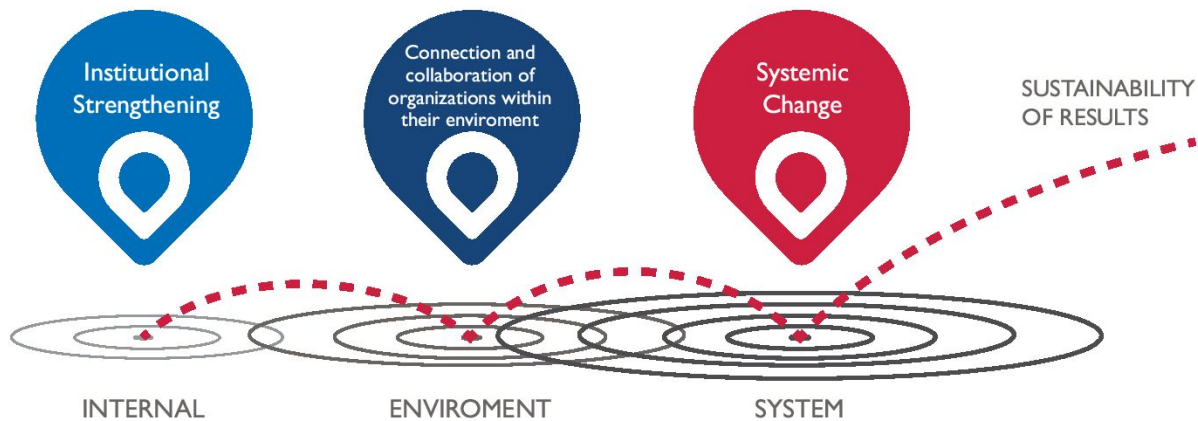
I. CIVIL SOCIETY ACTIVITY'S FOCUS ON CAPACITY DEVELOPMENT IN MEXICO

USAID/Mexico designed the Civil Society Activity (CSA) to improve institutional capacities and increase the sustainability of civil society organizations (CSOs) in Mexico so they can more effectively implement their agendas related to crime and violence prevention, legal justice reform, and human rights. CSA supports three of USAID/Mexico's Development Objectives: DO 1 on crime and violence prevention; DO 2 on access to justice; and DO 3 on human rights. Social Impact, a development management consulting firm based in Arlington, VA, is the prime implementer of the CSA contract and designed the approaches described in this Strategy based on close collaboration with our local partner organizations.

CSA's strategic approach was firmly rooted in the original capacity-building purpose; upon receiving a contract modification on June 22nd, 2018, CSA expanded its interventions to emphasize systems-based strengthening, in addition to internal organizational capacity development, to sustain

development results. With an emphasis on improved organizational performance, rigorous assessment, the co-creation of solutions, systemic impact, and sustainability, CSA's comprehensive approach is well aligned with USAID's Journey to Self-Reliance (J2SR)¹ and focus on measurable, increased local capacity. Thus, CSA provides a potential model for other USAID-funded capacity-building activities, as well as other capacity-building work, to enhance development impact and sustainability. Figure 1 highlights the three dimensions of CSA's Strategy.

FIGURE 1. CSA'S STRATEGY FOR SUSTAINABILITY OF RESULTS



CSA implemented a systemic approach to capacity development across three primary components:

GRANTS: Award and administer USAID grants to civil society organizations to help them develop their thematic projects and capacity development initiatives.

LEGAL STRENGTHENING: Provide technical support to improve legal compliance in areas of corporate, fiscal, and labor law; money laundering; and data privacy, through a network of pro-bono law firms based in Mexico, coordinated by CSA.

INSTITUTIONAL STRENGTHENING: Accompany CSOs in developing their capacities in three ways—by improving internal capacities, strengthening abilities to create and sustain strategic alliances, and solidifying their positions within their Local Systems—based on an integrated methodology that incorporates Human and Institutional Capacity Development² (HICD), Local Systems³ and Capacity 2.0⁴ approaches.

CSA worked with three groups of civil society organizations (CSOs), categorized in Tiers:

¹ USAID. n.d. "The Journey to Self-Reliance." Accessed July 27, 2020. <https://www.usaid.gov/selfreliance>

² USAID. n.d. "Human and Institutional Capacity Development." Accessed July 27, 2020. <https://usaidlearninglab.org/library/human-and-institutional-capacity-development>

³ USAID. n.d. "Local Systems: A Framework for Supporting Sustained Development." Accessed July 27, 2020. <https://www.usaid.gov/policy/local-systems-framework>

⁴ USAID. n.d. "Capacity 2.0." Accessed July 27, 2020. <https://usaidlearninglab.org/library/capacity-20>

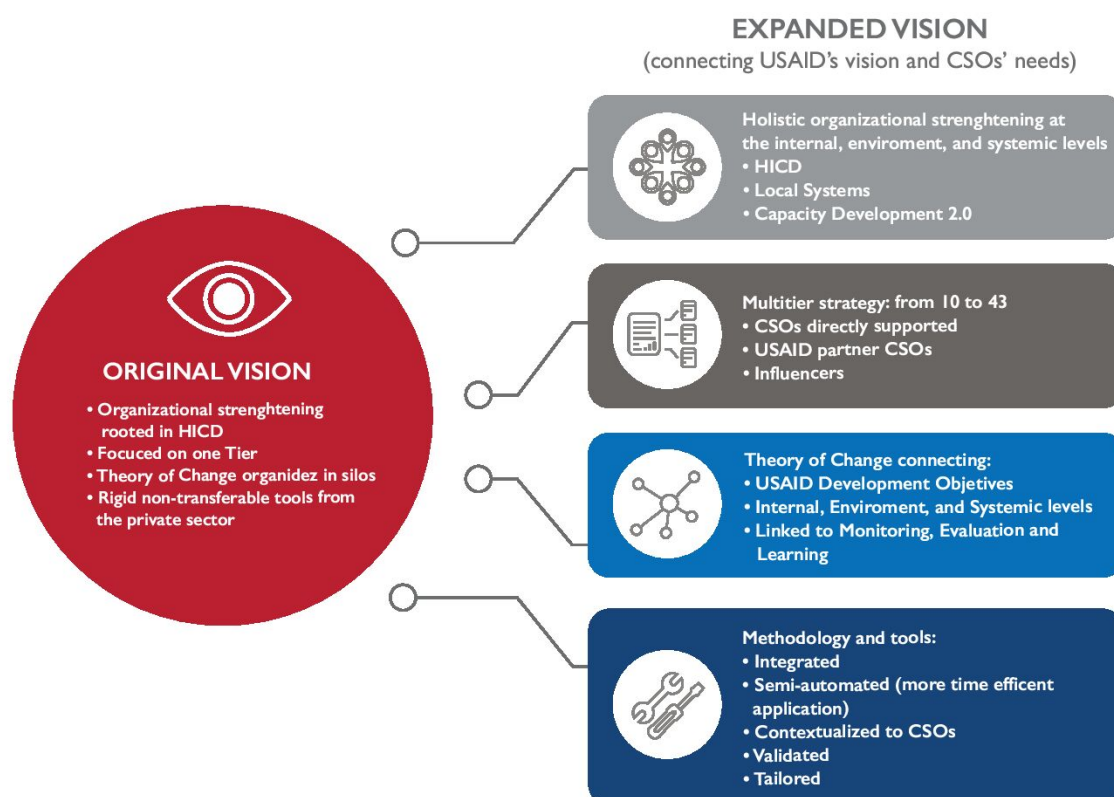
TIER 1: Ten CSOs that were awarded a USAID grant during Year 1. Three of these CSOs are Intermediate Support Organizations (ISOs) that replicated grants administration and capacity development with 14 CSO subgrantees. Organizations in this Tier received CSA's full range of technical assistance.

TIER 2: Fourteen CSOs that were introduced to CSA by USAID/Mexico and its implementing partners. Tier 2 organizations took part in a modular assessment of organizational performance based in USAID's Organizational Capacity Assessment (OCA), the Organizational Performance Index (OPI), Social Network Analysis (SNA), and Stakeholder Mapping. Tier 2 organizations then received technical assistance to improve their legal status and performance solutions to address performance gaps identified during the assessment process.

TIER 3: CSOs and actors who are influencers in the civil society sector. The influencers will sustain CSA's legacy in strengthening the Local System by leveraging their own areas of expertise to benefit civil society actors and their ability to collaborate within the system. These key influencers include innovators, whether they be leaders of change, intermediaries across sectors, or key sources of information for the civil society sector.

Figure 2 provides an overview of the expanded vision that the Civil Society Activity incorporated in order to achieve a systemic impact in its support of each of the three Tiers abovementioned.

FIGURE 2. EVOLUTION OF THE CIVIL SOCIETY ACTIVITY



Social Impact (SI) based CSA's original design on the HICD model. However, as CSA became familiar with Capacity 2.0 at USAID and held pause and reflect sessions with partner organizations, CSA determined a need to expand its capacity development approach. Consistent with Collaborating, Learning, and Adapting⁵ (CLA), the CSA team proposed additional components to the theory of change that would complement the original HICD design, while also drawing upon the latest best practices in the field. Aligned with the Local Systems and Capacity Development 2.0 approaches, CSA began to view organizational strengthening in three dimensions: strengthening internal capacities; strengthening relationships and networks in which organizations participate; and strengthening organizations' positions within their Local Systems.

In a major conceptual and methodological shift, CSA expanded its approach to capacity development by adopting USAID's Local Systems framework. Based on this framework, CSA views each CSO as one of many actors within a system working around a given social issue. For individual CSOs and the CSO sector to have sustainable impact, it is crucial to develop their organizational capacities to interact, communicate, and collaborate, including with other diverse actors operating in the same system. In this way, CSA could more effectively support organizations as they tackled complex challenges in their environments.

CSA'S THEORY OF CHANGE

CSA's revised theory of change is rooted in a holistic approach that incorporates USAID's Human Institutional Capacity Development, Capacity Development 2.0, and local systems approaches. CSA's theory of change is as follows:

"If CSA works to build the internal and external capacity of local CSOs and the connections between CSOs and key stakeholders, then CSA will contribute to the sustainability of the civil society sector and effective local programming to address crime and violence prevention, human rights protection, justice reform and transparency."

CSA assumes that organizations exist within systems that affect their performance as much as organizational performance can directly affect the broader system. For this reason, the CSA team found it important to establish a theory of change that focuses both on internal and external performance factors, thereby supporting performance improvement and the sustainability of results within the civil society sector in a way that leverages the individual characteristics and systemic contributions of each organization that CSA supports. Driven by this commitment to a capacity development approach that far exceeds the internal strengthening of organizations, CSA's theory of change aims to more comprehensively support the civil society sector in Mexico as it moves toward self-reliance and contributes to the achievement of USAID/Mexico's Development Objectives (DOs).

⁵ USAID. n.d. "CLA Toolkit." Accessed July 27, 2020. <https://usaidlearninglab.org/cla-toolkit>

SYSTEM ANALYSIS

The analysis of the systems in which CSOs operate is a key element in assessing organizations' capacities and supporting CSA's work to improve the position and influence of organizations in their systems. The levels considered in systems-level analysis are:⁶

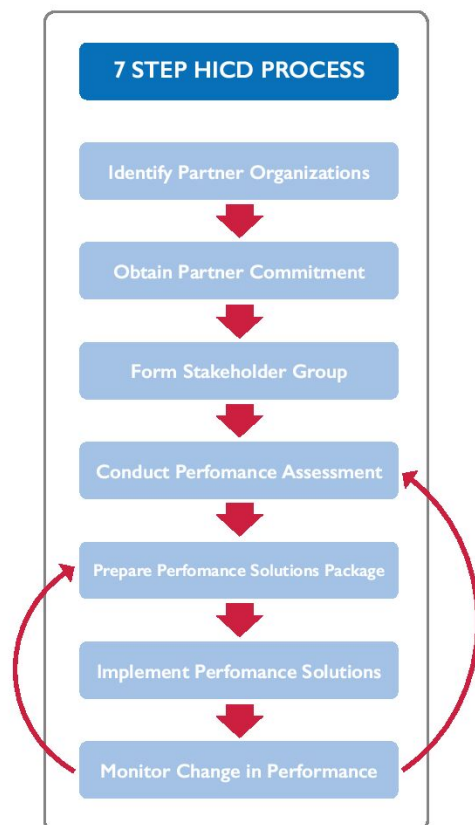
- **CONNECTIVITY:** The connections found within a system; that which unites actors through the causes, concerns, and interests they have in common. It is important to consider whether or not the strongest connections detected are actually the most effective.
- **VITALITY:** The capacity of connections within the system to remain intact and the actors' capabilities to perform in a way that is sustained by shared goals. System vitality depends on the connections formed internally among actors, as well as the structures available to support and sustain those connections.
- **RESULTS:** The results that are made possible by the connections established among actors in the system. These actors come together for a specific objective or common goal, but it is important to determine whether the objective is being achieved as a result of this network or alliance.

2. CSA'S CAPACITY DEVELOPMENT PROCESS

Over the course of implementation, CSA adopted and innovated a variety of capacity development approaches, and methodologies, adding value through strategic modes of implementation based in a combination of comprehensive (versus modular) and facilitated (versus self-administered) interventions, contributing to the strengthening of CSOs' (1) internal capacities, (2) external relationships and alliances with other actors, and (3) positions and roles within their local systems.

For institutional strengthening, CSA held firm to the implementation of the seven steps of HICD, depicted in Figure 3, below:

FIGURE 3. THE SEVEN STEPS OF HICD



Source: Human and Institutional Capacity Development Handbook (USAID, 2011)

⁶ Network Evaluation Practice, 2015.

INTEGRATED ASSESSMENT TOOL

Organizational performance assessment is an initial phase in the capacity development process to determine the baseline of the organization (the “as is” state) and identify key areas of opportunity for improved organizational performance, both in terms of internal and external capacities that will help organizations achieve a higher level of impact. CSA’s assessment process evolved alongside its theory of change, resulting in an innovative, flexible, and semi-automated Integrated Assessment Tool that brings together various instruments.

Initially, CSA’s organizational performance assessment was based in OCA, a tailored output-level tool that has been used by USAID programs working in capacity development elsewhere in Latin America and around the world. During the first several iterations of application, CSA determined that the original assessment criteria were far too extensive and would not permit partner organizations to carry out the assessment process on their own, given time and resource constraints. Following several adaptations, CSA arrived at a lighter and semi-automated tool that is flexible in its use, allowing the facilitator to quickly draw key findings and graphics from the assessment to inform decision making in real time. The CSA team emphasized helping partner organizations become more self-reliant as it designed, piloted, and adapted the OCA tool.

Once the theory of change expanded in scope, CSA identified the need to integrate other assessment tools. This need arose upon finding that the assessment tools that CSA originally designed focused only on internal capacities, were not transferrable and came from the private sector, significantly limiting their use. To assess how CSOs perform within their environment, CSA incorporated the Organizational Performance Index (OPI), a standardized outcome-level tool that has been used internationally within the context of capacity development by USAID and other development agencies to assess organizations’ outward-facing performance. CSA also brought in SNA, a quantitative and visual exercise to understand the connections and dynamics in the systems in which organizations are involved, and a fourth tool, Stakeholder Mapping, a qualitative exercise that identifies organizations’ abilities to navigate and build relationships within these systems. Each of these tools were suggested to CSA by USAID Mexico in guidance they provided to the team prior to the modification.

By assessing organizational performance and visualizing the composition of the local systems in which organizations are situated, the CSA team could carry out a holistic process of capacity development with an emphasis on the connections and impact of each organization within its system and the internal capacities required to improve them. Together, the combination of assessment tools (OCA, OPI, SNA and Systems Mapping) provided the technical means by which CSA was able to implement its integrated, systemic approach to capacity development.

To ensure the self-reliance of organizations during the assessment process, CSA integrated each of the separate tools into one flexible instrument, the Integrated Assessment Tool. This way, organizations themselves can more easily carry out an assessment of their internal capacities and processes (OCA), their performance (OPI), their ability to collaborate and interact with other actors in their local systems (Stakeholder Mapping), and their positions within the systems in which they operate (Social Network Analysis).

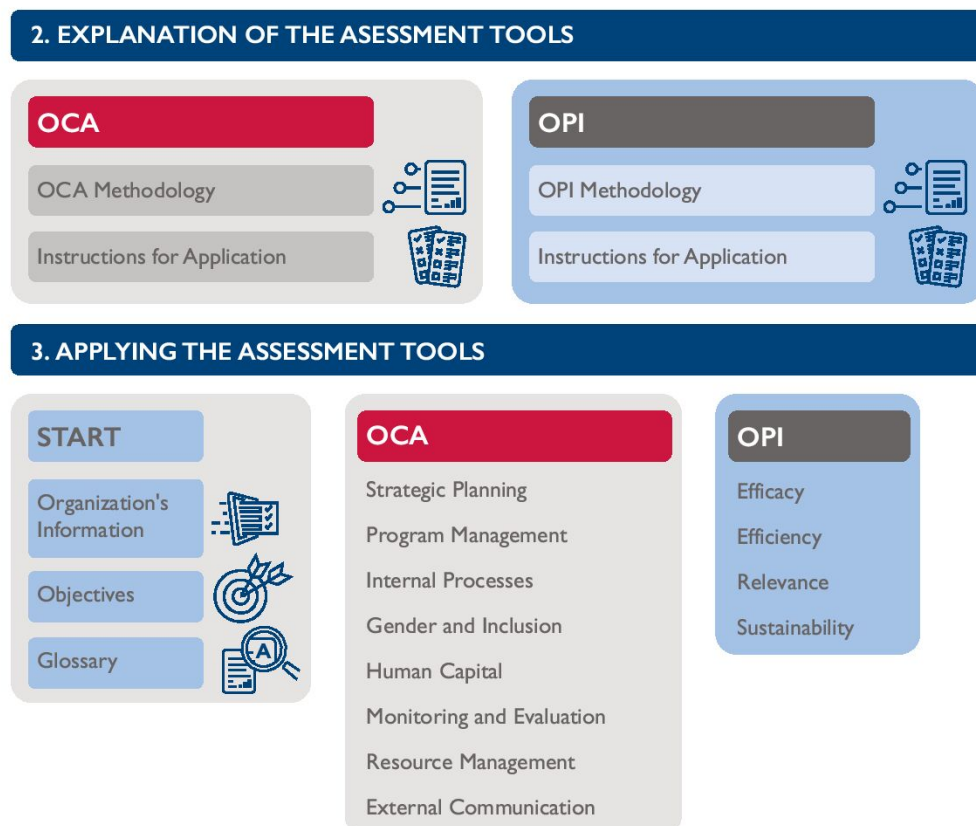
THE FIRST ELEMENT OF INNOVATION: A SEMI-AUTOMATED AND INTEGRATED TOOL

The integration of various tools into one semi-automated instrument facilitated the process of assessing various dimensions of organizational performance, allowing organizations to deepen their knowledge of internal capacities as well as their performance, relationships, and impact in their system. CSA's Integrated Assessment Tool is a product of the innovation and creative energy that SI, its partner organizations, and USAID/Mexico have dedicated to enhancing current development methodology and practice. Facilitators can use this one tool to apply OCA, OPI, SNA, and Stakeholder Mapping assessment instruments, record qualitative observations, draft preliminary recommendations, draw results, and generate graphs to demonstrating findings.

Moreover, the Integrated Assessment Tool provides a set of instructions for facilitators, specific assessment objectives, and a built-in glossary with click-and-go elements, promoting a user-friendly interface. By advancing in the integrated design and feasible application of organizational performance assessment, CSA contributes to the sustainability of capacity development in the civil society sector in Mexico and further advances the field of innovation within the capacity development sector.

Figure 4 presents the dashboard of the Integrated Assessment Tool.

FIGURE 4. CSA'S INTEGRATED ASSESSMENT TOOL



In applying this integrated instrument, CSA has come to some interesting findings:

- Based on the assessment results of CSOs supported by CSA, the most common areas of opportunity in internal capacities were in strategic planning, external communications, resource mobilization, and monitoring and evaluation, while the most common gaps in performance were in areas of results and sustainability.
- With regard to organizations' interactions with other actors within their operating environment, CSA found that many organizations require strengthening not only in the number of relationships they develop with other actors, but also in the quality and relevance of these relationships so as to impact the system without wasting resources. This area of opportunity is closely aligned to USAID's J2SR.
- Throughout the process of designing, piloting, and completing the Integrated Assessment Tool, CSA embraced principles of *adaptive management*, *knowledge creation*, and *co-creative design* with its partner organizations. These principles, which are intrinsic to USAID's CLA approach, made it possible to arrive at an assessment instrument that truly responds to the needs of partner organizations. For instance, by iteratively innovating and learning from the applications of previous versions of the tool in close collaboration with participating organizations, SI reduced the timeframe for assessment significantly. Less time spent on applying assessment tools means that CSOs can feasibly assess themselves and invest more time and resources to implement performance solutions.

THE SECOND ELEMENT OF INNOVATION: A MODULAR AND TAILORED TOOL

Furthermore, in order to ensure flexibility in its use, CSA designed the Integrated Assessment Tool for modular application. This modular design means that organizations can customize their use of the tool to align with priority areas to be strengthened, rather than using all the assessment categories. If organizations have already identified a specific area of opportunity to assess and improve their organizational performance, they can apply that part of the Integrated Assessment Tool, beginning with the relevant module of OCA that allows for the identification of specific performance gaps.

The next section provides more detail on the individual assessment tools that have been incorporated into the Integrated Assessment Tool.

ASSESSMENT INSTRUMENTS

The various instruments that CSA used during the organizational performance assessment serve distinct purposes and together allow CSA to strengthen internal capacities as well as organizations' outward-facing performance and at their position within the local system. The following section describes the purpose of each assessment instrument and how they are used.

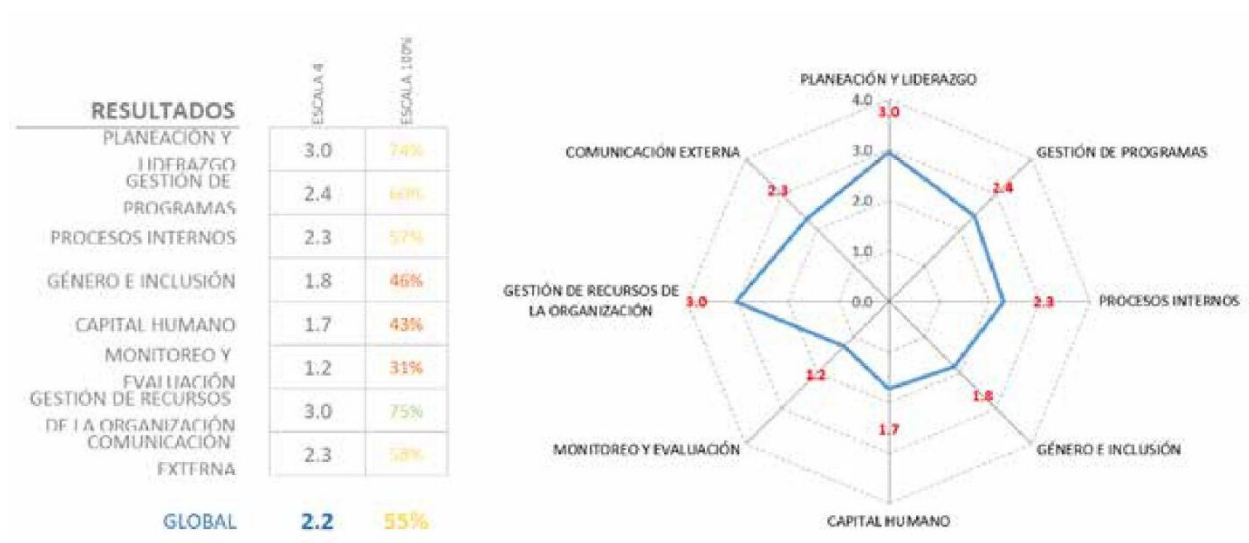
ORGANIZATIONAL CAPACITY ASSESSMENT (OCA)

The Organizational Capacity Assessment (OCA) is a participatory self-assessment tool that fosters collective learning and promotes reflection around an organization's internal capacities through group discussion and ranking. The tool is designed to generate group discussion on organizational strengths and weaknesses so that participants can together arrive at a concrete output action plan for capacity development based upon a set of priorities they agree upon. Once completed, OCA provides quantitative and qualitative findings that allow organizations to compare developments in their internal capacities over time.

In Year 2, CSA created an innovative, semi-automated version of the OCA tool to conduct a participatory assessment of internal organizational capacities for CSOs, focusing on eight areas of performance: (1) Planning and Leadership, (2) Program Management, (3) Internal Processes and Systems, (4) Gender and Inclusion, (5) Human Capital, (6) Monitoring and Evaluation (7) Resource Management, and (8) External Communications. During application, facilitators guided the group in rating each performance area according to its respective criteria and made notes on contributing factors and the organization's current state of performance.

Initially, CSA combined the application of OCA with a separate session dedicated to document review, complemented by directed interviews and surveys.⁷ The new Integrated Assessment Tool allows facilitators to register findings from document review directly in the tool to then automatically incorporate them into the report on findings and recommendations for institutional strengthening. After presenting preliminary findings to the organization, CSA analyzed root causes of gaps in organizational performance before confirming proposed performance solutions. Figure 5 illustrates an example of the semi-automatized OCA results.

FIGURE 5. SEMI-AUTOMATIZED OCA RESULTS



⁷ USAID, HICD Handbook, October 2010.

ORGANIZATIONAL PERFORMANCE INDEX (OPI)

The Organizational Performance Index (OPI) is an index that measures outcomes-level performance rather than internal capacities as such, allowing organizations to identify areas of opportunity that will directly contribute to the performance of the organization within its operating environment. OPI is an international, standardized tool that helps organizations with different natures in diverse contexts to understand and compare their performance in relation with others and how their capacities are linked to organizational performance across various domains, thereby serving a critical function within CSA's holistic capacity development approach.

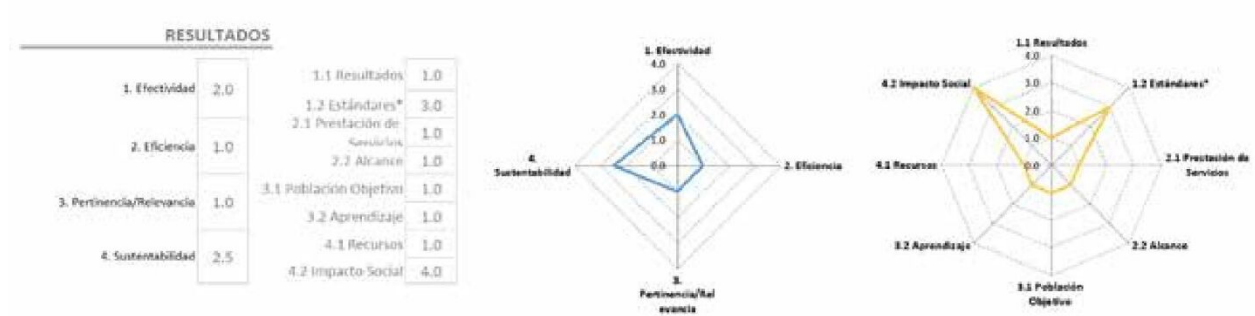
The domains that OPI assesses are:

1. **EFFECTIVENESS:** The ability of an organization to execute its programs with high quality and to constantly improve program operations in a way that is aligned with its mission and goals;
2. **EFFICIENCY:** The ability of an organization to plan and budget its activities in a consistently successful and cost-effective way;
3. **RELEVANCE:** The ability of an organization to respond to the actual needs of its clients and beneficiaries, to be alert to any change that influences this ability, and to alter its course of action and adjust its programs through learning processes; and
4. **SUSTAINABILITY:** The ability of an organization to ensure that its services are supported by a diverse group of local actors and international resources.

Within the Integrated Assessment Tool, CSA maintained the approved OPI format as it is universally applied while also adding user-friendly elements that ease facilitation and analysis. The design of the integrated tool lends itself to quicker scoring and data collection and automatically generates averages for each domain and for the organization as a whole in one global average that serves as the baseline measure for identifying patterns that can be monitored and evaluated in a standardized way for reporting.⁸ During application, facilitators may also note qualitative comments made by participants within the tool. Once it is time to present the results of OPI, all scores and comments automatically populate in one OPI dashboard with charts for each domain along with the global average. Figure 6 presents an example of the semi-automatized OPI findings.

⁸ Pact, *Organizational Performance Index (OPI) Handbook*, January 2015.

FIGURE 6. SEMI-AUTOMATIZED OPI FINDINGS

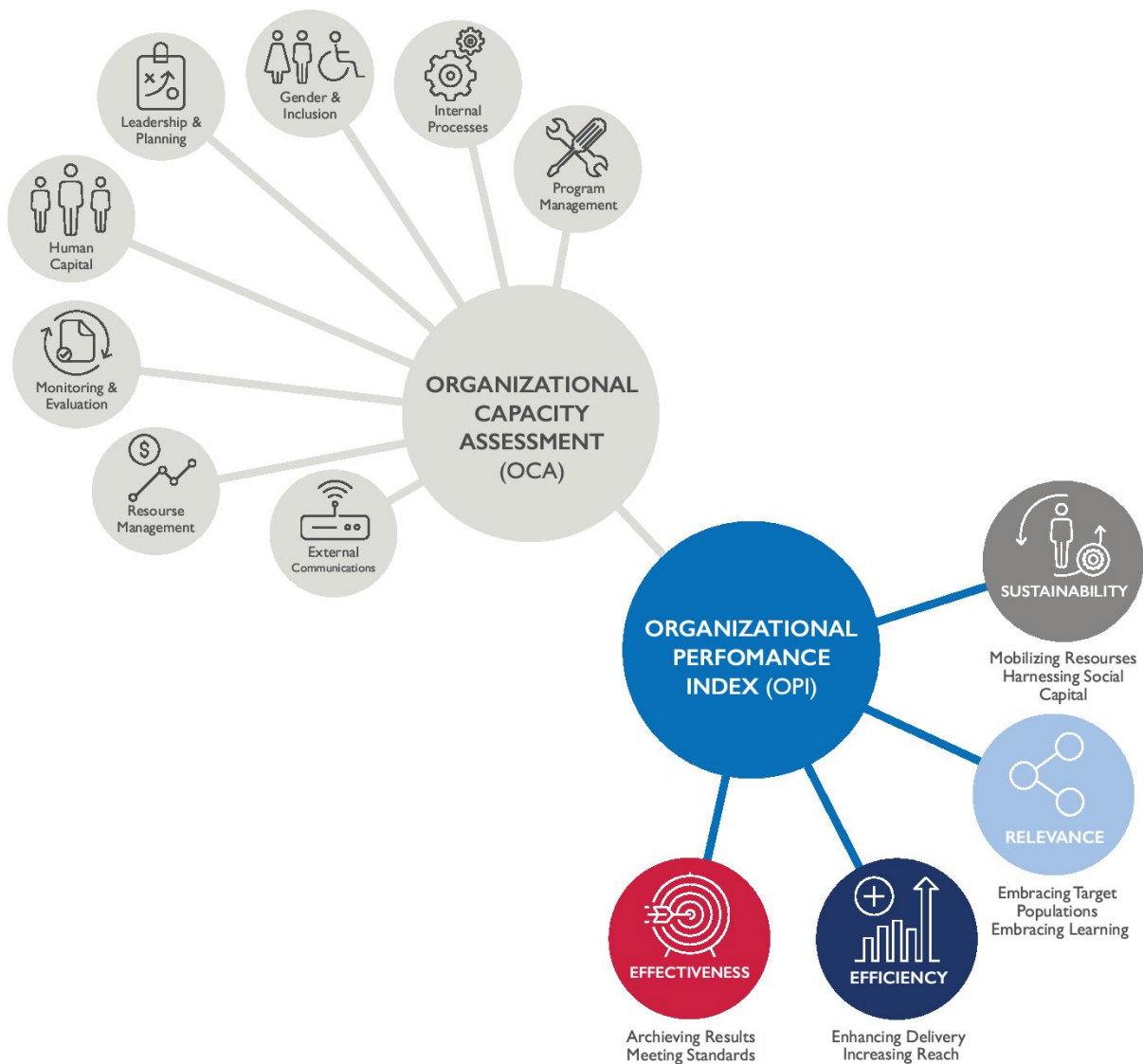


During the facilitation of OPI and the other assessment tools, CSA emphasized the linkages between the different tools' findings. For instance, CSA staff who facilitated OPI drew upon strengths and areas of opportunity that they detected using OCA and discussed the types of internal capacities that contribute to OPI results to make more concrete recommendations on how to improve each CSO's score. Also, it was key to note the subdomains that the organizations did not prioritize for improvement, or those where they did assign priority importance, in order to arrive at an appropriate work plan for capacity development for each individual CSO.

Figure 7 illustrates the various performance areas that are measured through the Organizational Capacity Assessment (OCA) and Organizational Performance Index (OPI).

Figure 7. Performance Areas measured through the Organizational Capacity Assessment (OCA) and Organizational Performance Index (OPI).

FIGURE 7.



STAKEHOLDER MAPPING TOOL

CSA implemented a Stakeholder Mapping tool to visualize how organizations are connected to their local system and the connections to various actors that contribute to or deter from the impact of their work. CSA applied the mapping tool using a participatory methodology after applying OCA and OPI. For CSA's partner organizations, stakeholder mapping served as the first step in defining how they connect to their local system, how they envision their role in their context, and how they visualize their impact in relation to other actors who influence their social agenda and have the potential to effect their own work.

Figure 8 demonstrates how CSA implemented the Stakeholder Mapping tool.

FIGURE 8. STEPS IN THE APPLICATION OF THE STAKEHOLDER MAPPING TOOL



During the application of the Stakeholder Mapping tool, CSA followed USAID's 5 R's methodology,⁹ first identifying key actors and then characterizing these actors based on their Role, Resources, Relationships, Rules, and Results. Ultimately, this tool helped partner organizations to visualize their local system in concrete terms, based on the following characteristics:

- **ACTORS:** Formal and informal actors across different sectors that affect, either positively or negatively, the social condition the organization seeks to improve.
- **ROLE:** A role or function that each actor currently plays within the system, regardless of their formal function (for example: legislator, advocate, influencer, etc.).
- **RESOURCES:** The resources that the organization receives from the actor or that are exchanged, whether they be tangible or intangible (for example, economic or financial resources, knowledge or information, and networks or social capital).
- **RELATIONSHIPS:** Type of relationship the organization has with each actor, whether it be collaborative, conflictive, strong, or weak, or a combination of these relationship types.
- **RULES:** The rules that govern how the organization interacts with other actors, whether they be formal (legislation or laws) or informal (social norms or common practice).
- **RESULTS:** The results produced through the organization's relationships and interactions with all actors within the local system, whether they be positive or negative.

CSA used the rich qualitative and quantitative information obtained from each mapping exercise to analyze and communicate (1) where organizations are strongest in terms of the fruitful connections they have created with other actors and (2) where there are *areas of opportunity*, including relationships in which organizations are directing energy with little to show for it.

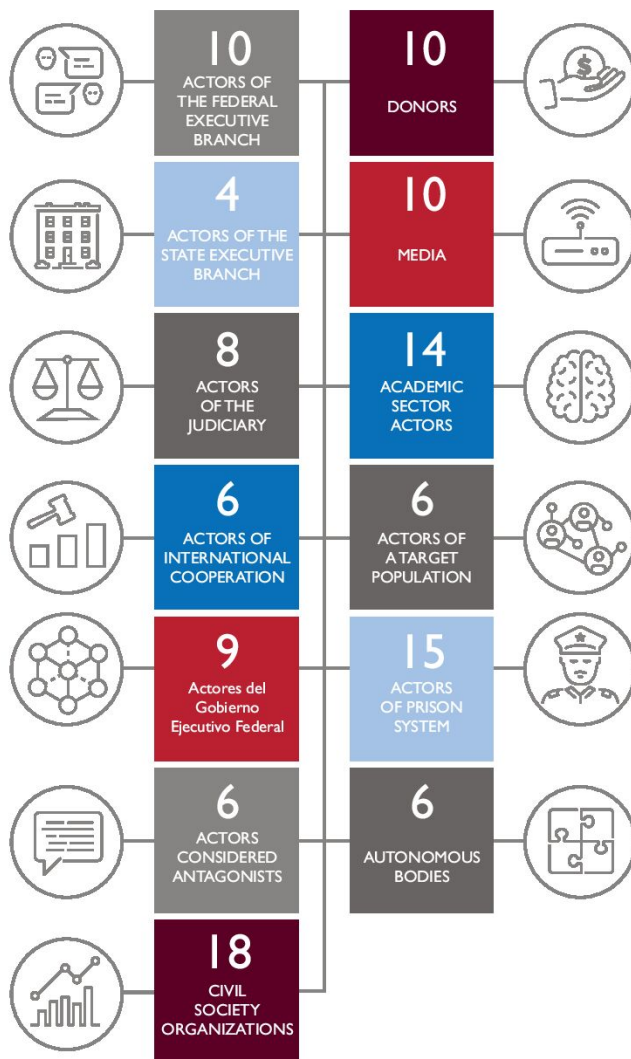
⁹ For more information, please visit USAID's Learning Lab material on the 5 R's methodology: <https://usaidlearninglab.org/library/5rs-framework-program-cycle>.

After analyzing findings about strong relationships that produce results versus relationships that do not produce results, the CSA team accompanied the CSO in a participatory process to decide which relationships to generate or renew and which to phase out. Ultimately, these findings informed the strategic planning and the creation of Strategic Alliance plans for organizations.

Figure 9 provides an example of the findings gathered from the Stakeholder Mapping exercise, which complemented the results gathered through OCA and OPI, particularly in the OPI domain of sustainability.

During the application of the Stakeholder Mapping exercise, CSA came to the following conclusions on how to approach systemic change through capacity development:¹⁰

FIGURE 9. STAKEHOLDERMAPPING RESULTS



- It is crucial for CSOs to identify the effort and resources they dedicate to creating and maintaining alliances together with the value they bring in terms of their impact or results. Most partner organizations did not initially approach strategic alliances with this in mind. Given this, CSA emphasized reflection and planning around the “strategic” part of strategic alliances.

- CSA partner organizations found the mapping exercise useful in identifying and responding to shifts in the political context, particularly organizations that are influencers or who advocate for public policy change. During strategic planning, organizations drew upon insights gathered during the mapping exercise to outline a vision and plan for strategic alliances that leverage their own contributions, as well as those of allies who complement their work in order to achieve greater impact and use resources more sustainably.

¹⁰ For more information on lessons learned, please the document consult *Emerging Practices in Capacity Development in the Civil Society Sector*, which is also part of CSA’s Legacy Compendium.

- Through the Stakeholder Mapping exercise, partner organizations detected the sectors they privileged in their strategic alliances as well as those they have not prioritized or even considered. For example, some organizations have strong connections and alliances with various levels of government and very few connections and alliances with the private sector, the media, and the academy. By analyzing findings derived from the mapping exercise, CSA and its partner organizations found that concentrating too much energy in alliances with any given sector may limit the sustainability of results and make them vulnerable to shifts in their environment.

Figure 10 illustrates the Stakeholder Mapping exercise in process.

FIGURE 10. STAKEHOLDER MAPPING EXERCISE

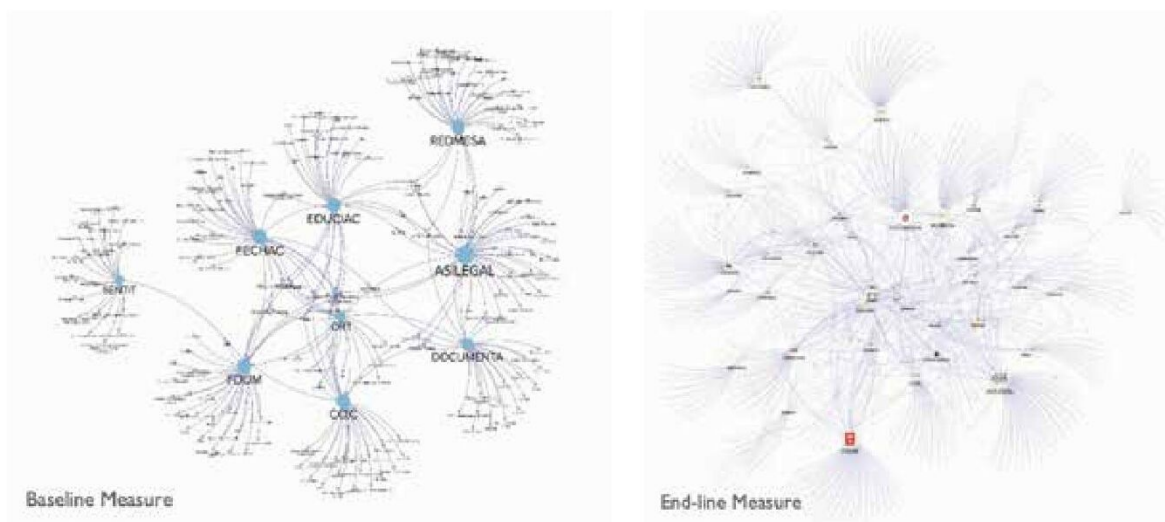


SOCIAL NETWORKS ANALYSIS (SNA)

Social Network Analysis (SNA), the last of the assessment tools to be implemented, allows organizations to measure and evaluate connections among actors at the systems level. The SNA tool helps organizations understand how external actors are connected and who has more influence and capacity to promote changes in the system. Unlike the Stakeholder Mapping exercise, which visualizes diverse connections and alliances in great detail, SNA is a visual and analytical tool that assesses which actors are linked in networks, coalitions, or clusters, which actors have the strongest social capital power and can exchange and transfer knowledge, resources, and capacities into the system, and also which are isolated, or where there are gaps in network connections.

SNA measures four types of systems-based performance:

1. **CLOSENESS:** Measures the average distance between one node and another. The closer the connection the better.
2. **CENTRALITY:** Measures how central or prestigious an organization (or actor) is, based on identifying the number of connections. More connections are always better.



3. ANALYZING RESULTS AND PLANNING CAPACITY DEVELOPMENT AND ACTIONS TO STRENGTHEN TIES IN THE SYSTEM

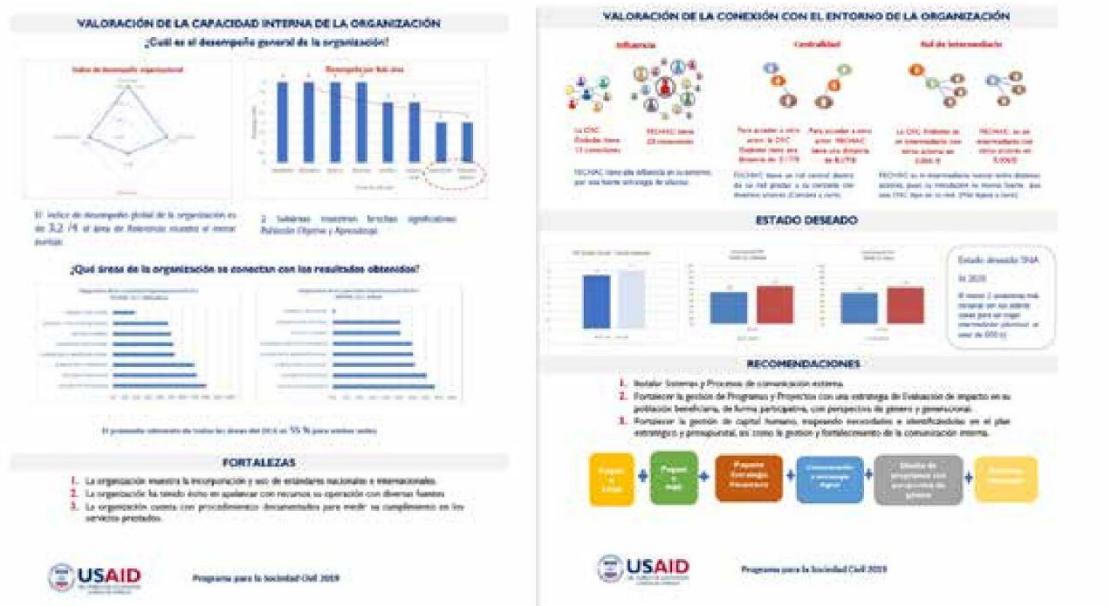
After the organizational performance assessment phase, CSA carried out the following processes:

1. Analysis of assessment results—OCA, OPI, Stakeholder Mapping, SNA (2 weeks)
2. Qualitative review of assessment process and root causes (1 week)
3. First draft of report on findings and recommendations (2 weeks)
4. General revision and editing (1 week)
5. Final graphic design edits (4 days)

The final product of CSA's process of assessment and analysis was a *Report on Assessment Findings and Recommendations and Systems Analysis* that the Activity delivered to its partner organizations with a two-page infographic that summarized assessment findings. CSA presented both documents to each organization during an in-person working session in which operational staff, leadership, and members of the Board of Directors participated. During presentations with partner organizations, CSA learned that it is crucial to discuss findings in an accessible way, clarifying what the findings informed rather than focusing at length on the technical results of each tool that was applied and the organizations' scores. This required that CSA synthesize and connect assessment findings across the various dimensions of institutional performance—internal, outward-facing, and systemic—in real terms and in a way that was not overly technical or abstract.

Figure 12 provides an example of the infographics that demonstrate gaps and areas of opportunity to internally strengthen the CSO and to strengthen its capacity to impact its local system.

FIGURE 12. INFOGRAPHICS SUMMARIZING RESULTS OF THE ORGANIZATIONAL PERFORMANCE ASSESSMENT



PRESENTING FINDINGS AND PRIORITIZING PERFORMANCE SOLUTIONS

Once partner organizations receive the *Report on Assessment Findings and Recommendations and Systems Analysis*, CSA scheduled a presentation on findings and recommendations from the participatory assessment process, focusing both on the organization's strengths and areas of opportunity. During this session, CSA provided a summary of the progress made in institutional strengthening to date across the various components of the program, including grants, monitoring and evaluation, legal strengthening, and capacity development.

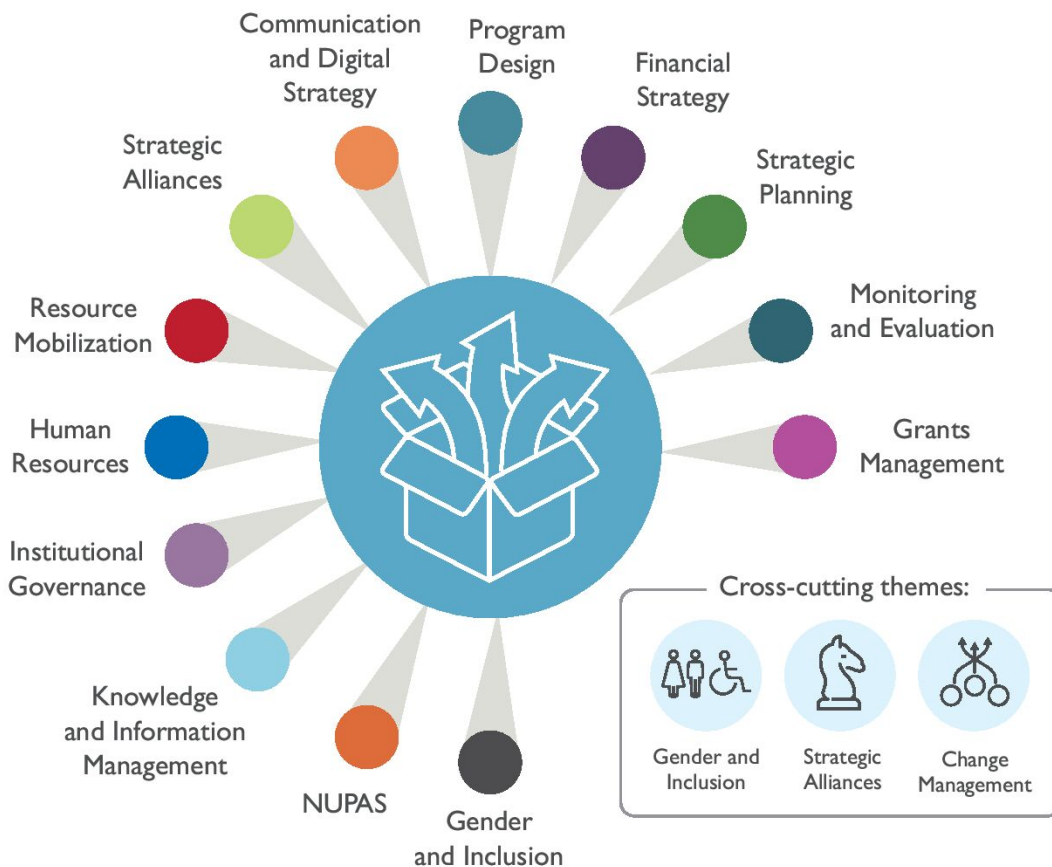
This session was designed to be an interactive space of open dialogue with all members of the organization who are present. CSA facilitators set a tone that is to-the-point and based in everyday language so that all members of the organization can own the process of institutional strengthening, recognize what it requires in terms of their own professional development, and better understand how organizational capacity development relates to their aspirations to have a greater impact. Based on experience, CSA found that a successful session requires probing participants' reactions and attitudes regarding the findings about their organization's strengths and opportunities to determine whether they are aligned with their colleagues' perception of the organization and, if not, address any difference of perspective directly.

Ultimately, the goal of the session is to generate an open discussion on CSA's recommendations for performance solutions to arrive at concrete agreements on next steps in institutional strengthening. These discussions were oriented towards generating agreement on prioritized needs, which were effectively early versions of a work plan. In practice, this involved guiding the group through the process of reaching consensus around priority areas of organizational performance to strengthen by selecting solution packages that the CSO was to implement with CSA support, as described in the following section.

IMPLEMENTING SOLUTION PACKAGES AS TAILORED PERFORMANCE SOLUTIONS

For CSA, an important strategy for improving organizational capacity was the implementation of tailored Solution Packages, a series of packets covering different thematic areas identified as common areas of opportunity in the civil society sector in Mexico. As illustrated in Figure 13, below, the solution packages that CSA implemented with partner organizations are: Grants Management, Institutional Governance, Communications and Digital Strategy, Monitoring and Evaluation, Strategic Planning, Program Design, Gender and Inclusion, Human Resources, Resource Mobilization, Financial Strategy, Strategic Alliances, Knowledge Management and Non-US Pre-Award Survey (NUPAS). Based on the Integrated Assessment Tool results, CSA adapted each solution package to the specific needs of each organization based on the results of its participatory assessment as well as the constraints and priorities of each organization. Cross-cutting themes that run through the solution packages are change management, strategic alliances, and gender and inclusion.

FIGURE 13. CSA'S SOLUTION PACKAGES



The solution package served as the methodological guide to implement customized performance solutions based on the *Capacity Development Intervention Guide for Program Design* produced by USAID, Social Impact, and FHI 360. During the implementation of solution packages, CSA drew upon best practices by implementing solution packages utilizing a series of modalities including: workshops,

mentoring, peer-to-peer learning, webinars, coaching, and self-learning, each based in learning-by-doing exercises, which CSA consultants, subcontractors, and influencers provided to partner CSOs through an individualized work plan. These same solution packages were transferred to ISOs that further customized and implemented them during their own capacity development work with their subgrantee CSOs. All organizations that CSA accompanied will be able to continue to implement the solution packages, contributing to USAID's Journey to Self-Reliance.

To further self-reliance, CSA mobilized the contributions of influencers (Tier 3) and learning communities to strengthen the exchange and connections that can potentially sustain legal support, access to technical, and financial resources as a part of the solutions packages, which is explained in further detail later in this document.

WORK PLAN FOR INSTITUTIONAL STRENGTHENING

Each organization's plan for capacity development was the product of the participatory prioritization of performance solutions by CSA and partner organizations to ensure they were feasible and relevant given the time and resources required as well as how well they align with the organization's objectives.

Based on these priorities, CSA worked with CSOs to design a tailored plan for capacity development informed by:

- An in-depth analysis of the areas of opportunity and root causes of gaps in organizational performance based on findings from the OCA, OPI, Stakeholder Mapping, and SNA assessment tools.
- The alignment of areas of opportunity and prioritized solutions that CSA recommends with the interests and needs expressed by partner organizations during the presentation of findings and recommendations, and subsequent meetings.
- The absorptive capacity of partner organizations that affected the implementation of solution packages. Given the importance of each organization's absorptive capacity, it was key for CSA to effectively communicate the workload that the application of the selected solution packages will require.

As work plans were drafted and implemented, CSA coordinated the tailoring of solutions in collaboration with partner organizations and a team of specialists who were responsible for customizing and implementing performance solutions. Ultimately, partner organizations had the final say in confirming the work plan for capacity development and approving any adjustments.

Figure 14 provides a sample work plan for institutional strengthening.

FIGURE 14. INSTITUTIONAL STRENGTHENING WORK PLAN



STRENGTHENING ORGANIZATIONS' COMPLIANCE WITH LEGAL REQUIREMENTS FOR SYSTEMIC CHANGE

Legal strengthening was a strategic dimension of CSA's capacity development approach. This is because the Mexican regulatory framework for CSOs is quite complicated and, in many cases, contradictory. Seldom were partner organizations equipped with the capacity to comply with—let alone anticipate and respond to changes in—a regulatory framework that constantly changes and that overregulates the sector. At the same time, there are very few capacity development professionals who are familiar with the legal framework regulating the civil society sector to develop organizational capacities in this area.

To carry out legal strengthening, SI partnered with Fundación Appleseed México, A.C., a CSA subcontractor and strategic ally. Fundación Appleseed México is an organization that has pioneered systemic change in the civil society sector of Mexico by bringing together CSOs and a pro-bono network of law firms so that CSOs have access to advice and technical support on how to comply with legal requirements. This technical advisory support not only contributed to partner organizations' compliance with legal regulations in their structures, processes, protocols, and practices, but also fostered a culture of transparency and accountability within the sector as a network that brings systemic change to the civil society sector.

Figure 15 demonstrates how Appleseed strengthened the civil society sector in areas of legal compliance, highlighting the characteristics of the pro bono network, the activities that they carry out, and the organizations with which they are allied. As the image illustrates, the legal support offered to CSA's partner organizations contributes to the strengthening of the civil society sector in various ways. First, the network of pro bono network of lawyers accompanies organizations to improve their legal compliance in five legal areas: prevention of money laundering, data privacy, and corporate, fiscal and labor law. In doing so, organizations are more transparent and are more prone to generate the trust of authorities and society more broadly.

FIGURE 15: LEGAL STRENGTHENING FOR CSOS BY APPLESEED'S NETWORK OF PRO BONO SUPPORT



Finally, the very network of pro bono lawyers exchanged best practices in complying with new legal requirements as they emerged, which were then documented in manuals that were disseminated to the sector and in legal seminars. Altogether, these activities contributed to a stronger sector that is more compliant with legal requirements and resilient to changes in the regulatory framework. It is key to note that the support that this network provides to the sector will continue well after the completion of the Civil Society Activity.

MEASURING IMPROVEMENTS

The results that CSA gathered during the OCA, OPI, Stakeholder Mapping, SNA, and legal assessments established the baseline for institutional strengthening and for measuring changes in organizational capacities and performance. An intermediate and an end-line measurement allowed comparison over time to identify the effectiveness of the strengthening efforts, as well as lessons learned and best practices, as based on the CLA approach, considering two fundamental issues: sustainability and replicability of the initiatives developed.

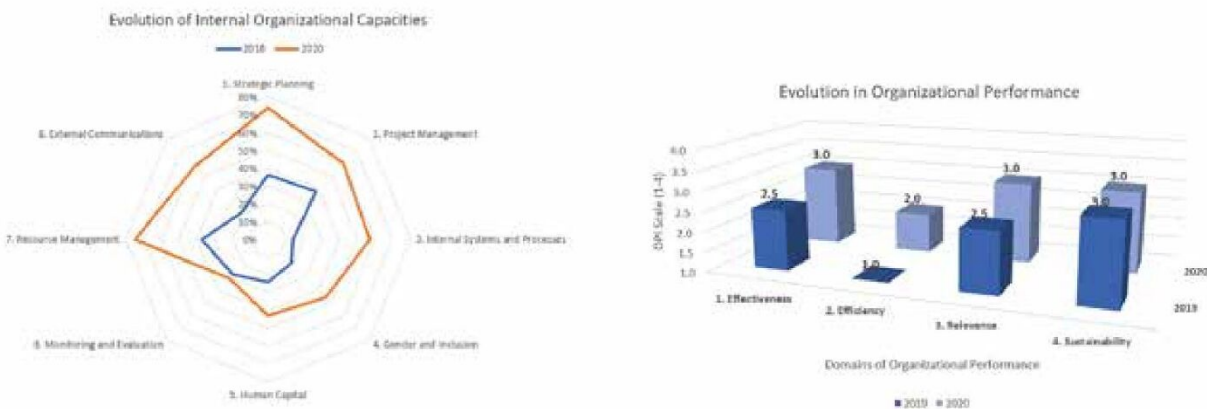
To properly monitor advances, each indicator was reported and tracked according to its measurement criteria and schedule. CSA developed four trackers to demonstrate monthly progress by organization, reflecting advances made in the implementation of solution packages and the stage of the institutional strengthening process. CSA also administered surveys to gauge satisfaction and knowledge during the implementation of solution packages, allowing staff to systematize

progress made with each organization and identify possible changes needed in the implementation of solution packages in the future.

In addition, organizations submitted quarterly reports in which they discussed their progress, lessons learned, and success stories to highlight the impact of the organization's work. These reports also provided information on organizations' advances in their programmatic implementation and financial activity. In the case of Intermediate Support Organizations (ISOs), they also reported on progress made by subgrantees in the implementation of institutional strengthening and their thematic projects.

Figures 16 demonstrates improvements in OCA and OPI scorings based on baseline and end-line measurements.

FIGURE 16. EVOLUTION OF INTERNAL ORGANIZATIONAL CAPACITIES (OCA) AND ORGANIZATIONAL PERFORMANCE (OPI)



4. OTHER TECHNICAL SUPPORT OFFERED BY CSA

GRANTS MANAGEMENT AND PROGRAMMATIC SUPPORT

The process of capacity development in Grants focused on the evaluation and selection of CSOs, the administration of the grant award, and monitoring the execution of the grant. The grant that each CSO received was targeted toward institutional strengthening and developing a project that is thematically linked to USAID's /Mexico's Development Objectives (DOs) in areas of human rights protection, crime and violence prevention, and reform of the justice system. In addition to providing grantee organizations with funds to carry out their technical programs, the grant allowed CSOs to acquire the knowledge and skills to manage USAID funds, which in itself strengthens administrative capacities. CSA directly administered the grants of ten Tier I organizations, including ISOs responsible for replicating grants administration, as well as two subgrantee organizations supported by ISOs, and offered support in monitoring and evaluating grant management. All organizations that receive USAID funding participated in a Non-U.S. Organization Pre-Award Survey (NUPAS) assessment facilitated by CSA before they are awarded the grant. NUPAS is a USAID due diligence tool that

was developed to ensure that local organizations receiving USAID funds have the systems and procedures in place to properly administer and report on the execution of USAID funding.

MONITORING, EVALUATION, AND LEARNING (MEL)

The Monitoring, Evaluation and Learning (MEL) team also served a vital role in ensuring that the Activity was constantly advancing towards established goals outlined in the Results Framework and using Activity-wide indicators. As part of this support, the MEL team developed a series of trackers to register how organizations were advancing in their capacity development that both provided information on when adjustments were required and allowed for easy reporting. Moreover, the MEL team assembled a team of consultant-experts who were assigned to the partner organizations to provide individualized technical support during the development of Logical Frameworks, indicators, databases and quarterly reports. These consultants accompanied organizations during the implementation of other performance solutions in order to guarantee coherence with MEL systems and instruments.

Figure 17 illustrates the various technical areas of support that CSA provided to civil society organizations in an integrated fashion.

FIGURE 17. CSA'S INTEGRATED TECHNICAL SUPPORT



TECHNICAL ASSISTANCE

As CSA and partner organizations began to develop work plans for capacity development, CSA contracted and trained a team of consultants who are specialists in specific areas of capacity development to guide the tailoring and implementation of solution packages. During this phase of technical assistance, the consultant-specialists determine how to adapt and schedule the implementation of solution packages to meet the needs of each organization, based on findings gathered during the assessment phase, as well as the interests and absorptive capacity of the partner organization.

This model of aligning the work of local consultants to address the needs of partner organizations allows CSA to expand the capacity of a Mexico-based capacity development team, which is vital to the sustainability and legacy of CSA. In building this cadre of local capacity development consultants, CSA is well-aligned with the Journey to Self-Reliance by supporting the capacity development of both target organizations and their broader system, which includes professionals who now embody improved skills and networks across the CSO community.

5. CAPACITY DEVELOPMENT AND ITS IMPACT ON THE SYSTEM

MAINSTREAMING AN APPROACH ROOTED IN STRATEGIC ALLIANCES

Given CSA's modified theory of change, organizations' abilities to create and sustain strategic alliances with other actors in organizations' local system was a key part of improving capacity as it further defines the position and influence of partner organizations in relation to other actors. To do so, the Activity mainstreamed an approach to Strategic Alliances in most of its capacity development processes. When facilitating assessments, designing work plans, and implementing performance solutions, CSA guided organizations in making decisions informed by systems-based thinking, emphasizing areas in which partner organizations can develop common goals and sustain results in collaboration with other actors. CSA worked to strengthen organizations' capacities to plan ways to accomplish greater impact in their local system throughout the entire capacity development process. For this reason, Strategic Alliances was mainstreamed in the implementation of performance solutions, shaping strategic and operational plans, and logical frameworks, as well as advocacy and communications strategies. Additionally, the Activity monitored and reported the contributions that its partner organizations received through their alliances with other actors.

ADDITIONAL STRATEGIES TO STRENGTHEN THE LOCAL SYSTEM

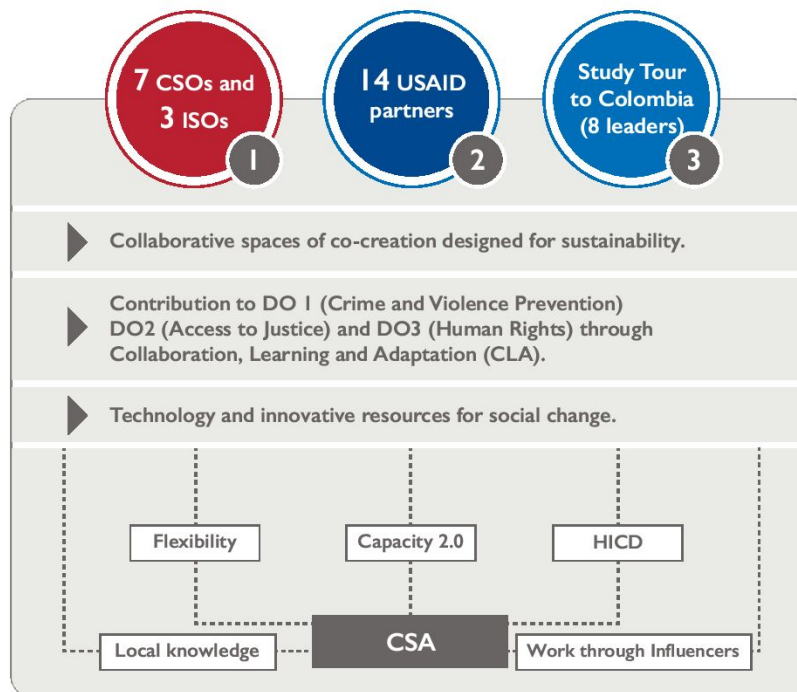
CSA's theory of change held that capacity development should not only strengthen organizations in terms of their internal capacities but should also improve organizations' abilities to impact and interact with other actors within their local system. To build capacity at the systems level, CSA also designed and implemented the following strategies:

LEARNING COMMUNITIES

The Learning Community is a CSA initiative based in Collaboration, Learning, and Adaptation (CLA) that is composed of partner organizations who collaborate and learn how to approach capacity development as a group.¹¹ By design, the goal of the learning communities is for organizations to strategize and collaborate on their own. The learning community model originally took the form of in-person sessions but was soon complemented by a virtual community to improve daily communication. Within these spaces, partner organizations' leadership and operational staff discuss topics of common interest and share best practices and lessons learned around topics within and beyond the scope of capacity development, including the thematic areas in which organizations focused their social interventions. The Learning Community continues to ensure that knowledge exchange remains in the hands of organizations, their alliances, and collaborators, promoting both the impact that partners organizations can achieve and the sustainability of CSA's reach in capacity development in the civil society sector in Mexico. CSA's strategic document on the sustainability of learning communities provides more detail on the subject.

Figure 18 provides information on the three Learning Community groups and their primary characteristics:

FIGURE 18. CSA'S LEARNING COMMUNITY GROUPS



¹¹ For more information on CSA's Learning Communities, please consult the document Building Sustainable Learning Communities to Strengthen the Local System, which is also part of CSA's Legacy Compendium.

STUDY TOUR TO COLOMBIA

As an extension of the Learning Community model, CSA designed and carried out a Study Tour in which eight local leaders representing diverse organizations and institutions in Northern Mexico traveled to Medellín and Bogotá, Colombia to learn about best practices in violence prevention that were utilized during the drug war that took hold of the country.¹² The Study Tour occurred from November 11 to November 15, 2019. This initiative incorporated all three dimensions of CSA's Capacity Development approach, though was most oriented towards strengthening the position of CSOs in the local systems in which they operate with the goal of strengthening the local system to support a strong civil society that works alongside other sectors to achieve sustainable results.

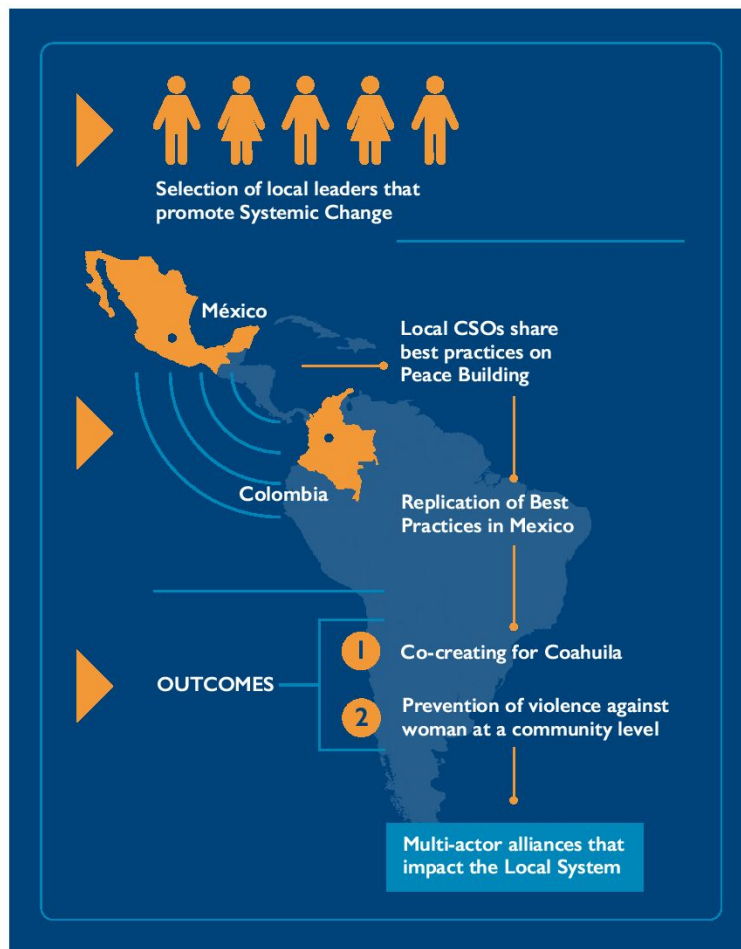
CSA designed the Study Tour initiative based on the following three strategic principles:

- **Strengthening the local system:** The Study Tour strengthened the local system as it offered a unique, peer-to-peer learning opportunity that allowed for foreign best practices to be examined, replicated, and scaled internationally, enriching participants' vision of how to generate sustainable change in Mexico.
- **Inclusion of geographically-linked local leaders:** The Study Tour participants were local leaders who lived in the same states so that upon their return, they could systematize and apply the lessons learned from this experience in projects designed to have an impact on their local system, according to the social challenges they face together in their operating environment.
- **Focus on alliances:** The initiatives developed by the participants as a result of the Study Tour aimed to integrate different sectors (private, public and organized civil society) to form collaboration networks and long-term alliances for sustainable change.

Figure 19 provides more information on the design of the Study Tour model.

¹² For more information on the Study Tour model, please consult the document *Study Tour Initiative: Model of Replication*, which is also a part of CSA's Legacy Compendium.

FIGURE 19. CSA'S STUDY TOUR



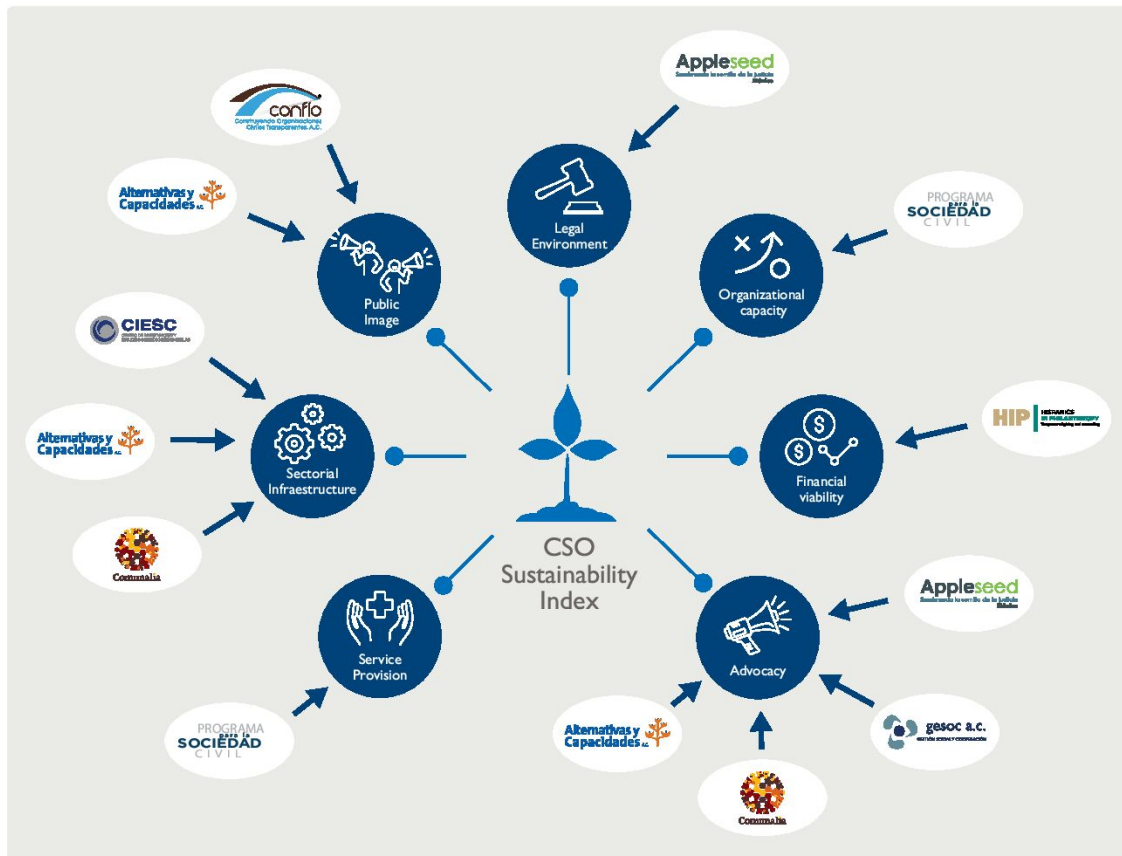
COLLABORATION WITH INFLUENCERS

In order to strengthen the civil society sector as a whole, CSA partnered with organizations that the Activity identified as “influencers,” or actors could generate change at a systemic level. Some influencers served as “connectors” by building bridges and bringing together stakeholders across an array of backgrounds, ideologies and sectors. Others served as “knowledge hubs” that produced and disseminated valuable information for the rest of the system. Another group served as trend setters that disrupted the system, either through their leadership and reputation, their ability to innovate, or their position to shift incentives for others.

CSA’s point of departure was the CSO Sustainability Index (CSOSI), a USAID funded initiative that assesses the strength and viability of the CSO sector in over 70 countries (see: <https://csosi.org/>), across seven dimensions: the legal environment, organizational capacity, financial viability, advocacy, service provision, sectoral infrastructure and public image of the sector.

CSA promoted the first implementation of the Index in Mexico (2018), which was the first time that the Index was applied in a Latin American country.

FIGURE 20. CSA'S COLLABORATION WITH INFLUENCERS

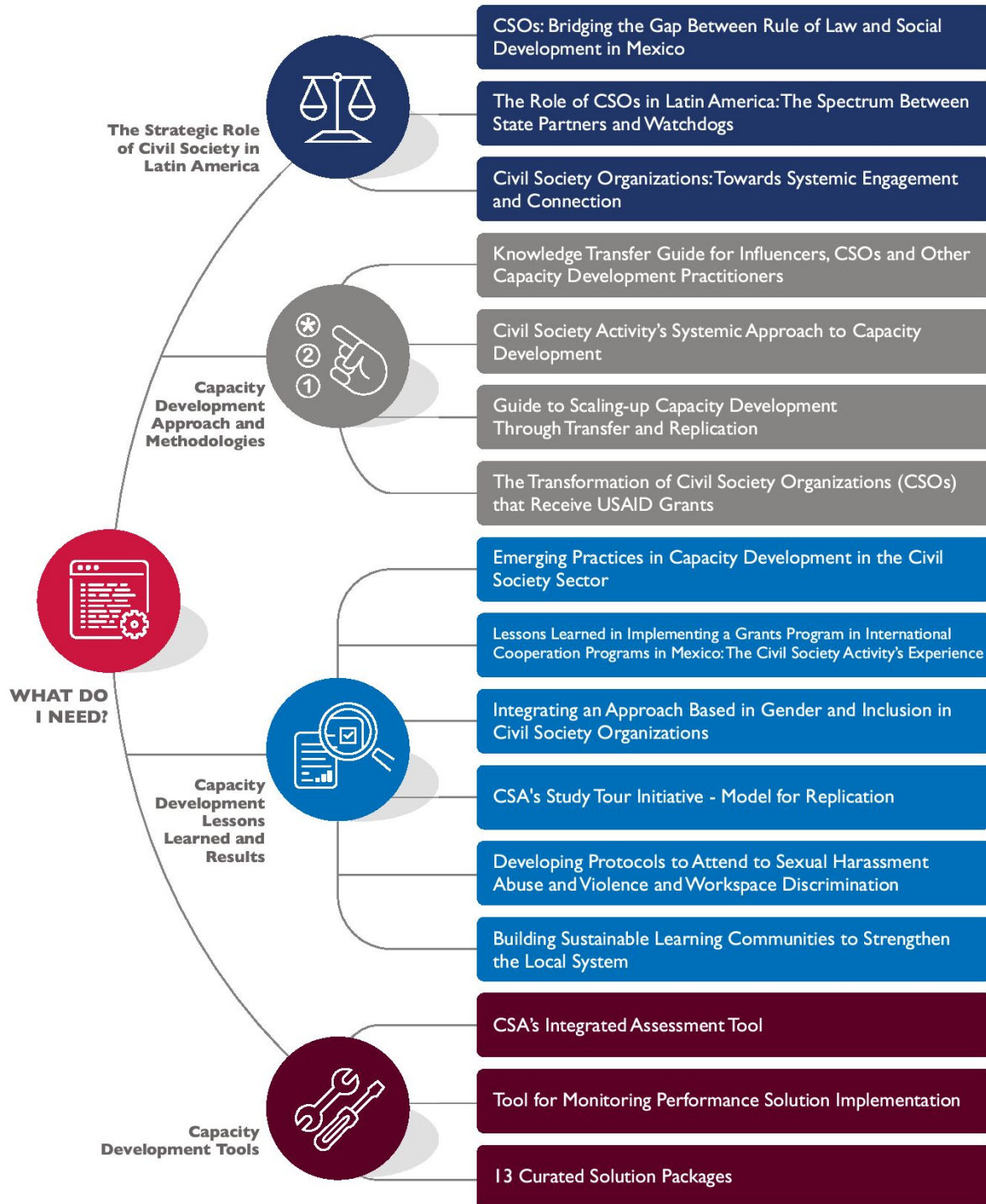


TRANSFER OF CSA'S APPROACH TO STRATEGIC PARTNERS

A final example of CSA's strategies for systemic change is the transfer of its capacity development approach, strategies, tools, instruments and performance solutions to strategic partners that may continue to strengthen the civil society sector after the Activity's close-out. During the last two months of CSA's implementation, the Activity's institutional strengthening team dedicated themselves to assembling CSA's Legacy Compendium and to providing tailored workshops to transfer CSA's approach to strategic partners in a modular fashion, based on their areas of interest and expertise. Many of these strategic partners are the influencers that partnered with CSA to strengthen the civil society sector over the course of implementation. This transfer process was closely monitored and was crucial to ensure the sustainability of CSA's legacy in the long-term.

Figure 21 illustrates the documents that comprise CSA's Legacy Compendium.

FIGURE 21. CSA'S LEGACY COMPENDIUM



CONCLUSION

Implemented by Social Impact, the Civil Society Activity has broken new ground in organizational capacity development by expanding and integrating a suite of conceptual organizational strengthening approaches (HICD, Capacity Development 2.0, and Local System) for Mexican CSOs working to reduce corruption, crime, and violence. CSA's capacity development strategy targeted three dimensions: (1) strengthening internal capacities and organizational processes, (2) strengthening organizations' performance and their ability to develop and sustain strategic alliances, and (3) strengthening organizations' position within the system in which they carry out their work, while also working to make the environment in which civil society organizations work more hospitable.

To accomplish this, CSA developed a robust implementation model that began with the application of a flexible and automated assessment tool with user-friendly functionality, combined with participatory processes for assessing organizational performance. Based on performance assessment, CSA prioritized and implemented a wide range of customized capacity development interventions in a participatory and tailored fashion with more than forty partner organizations that incorporated an approach rooted in change management, strategic alliances, and gender-based perspective. Emphasizing sustainable approaches to strengthening, CSA went beyond improving the performance of individual organizations to strengthen the civil society sector as such by galvanizing networks and alliances through learning communities and in incorporating influencers within the strengthening processes. CSA contributes to the innovation in capacity development that USAID has championed by designing an ambitious, multi-faceted and sustainable approach to capacity development and systemic change that lends to USAID's Journey to Self-Reliance.

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